

ANALYSIS OF
SCHOOL JURISDICTION
2000-2003 EDUCATION
PLANS: C.A.S.S. INPUT
ON ACCOUNTABILITY
ISSUES

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This document is intended primarily for:

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EXECUTIVE SUMMARY

This report analyzes school jurisdiction 2000-2003 education plans and input obtained from fall 2000 College of Alberta School Superintendents (CASS) zone meetings. The primary objectives of this analysis were to

1. Support school jurisdiction education planning efforts as a means to stimulating continuous improvement within the jurisdiction.
2. To consider key implications of the school jurisdiction education plans for provincial/Ministry three year planning.
3. To provide a summary report to education stakeholders and the public regarding education planning in Alberta.

Key findings and observations through this analysis included the following:

- Forty-eight school boards elected to complete major revisions of their education plans to reflect the new ministry's structure and planning framework, and 11 jurisdictions decided to complete minor revisions of their plans.
- The quick analysis of school jurisdiction education plans completed shortly after the due date identified key issues for improving the articulation between provincial and jurisdictional planning (see pages 2 and 8).
- Feedback from superintendents and associate superintendents obtained at fall 2000 CASS zone meetings included the following key insights:
 - CASS members expressed near consensus that the primary purpose of accountability is to support processes of continuous improvement.
 - Superintendents identified the need for greater opportunities for local input into decision-making in the provincial accountability model.
 - Improved technical information on provincial achievement tests and diploma exam data comparability is required in relationship to target setting processes.
 - A number of outstanding accountability issues are being addressed via revisions to the annual *Guide to School Board planning and Reporting*
- Several priorities or strategies in the provincial plan require a higher profile in local planning. These areas include: increasing high school completion, improving public satisfaction, and students' readiness to learn.
- Sample outcome-related strategies and sample measures identified in school jurisdiction plans are highlighted to facilitate sharing and further development.

Much of the information in this report has been considered in a timely way by Ministry staff and is reflected in the revisions to the new *Guide to School Board Planning and Reporting* published in February 2001. Better measures and a more appropriate balance between compliance and collaboration are emerging in the Alberta basic education accountability model. It is clear that greater commitment to and understanding of the Alberta accountability model accrue from on-going dialogue around accountability issues and it is in this spirit that this report is provided.

INTRODUCTION

Major vs. Minor Revisions

In May 1999 the ministries responsible for basic and post-secondary education were combined into a single ministry, Alberta Learning. This amalgamation dramatically affected the content and scope of the government's three year plan affecting the education sector. School boards were given the option for the 2000-2003 education plans to either adopt the new goals and outcomes reflected in the new government three year plan or they could continue with the planning framework defined by the former Alberta Education three year plan. Forty-eight school boards elected to complete major revisions of their education plans to reflect the new ministry's structure and planning framework, and 11 jurisdictions decided to complete minor revisions of their plans.¹ The breakdown of major and minor revisions to education plans by zone reflects an almost universal adoption of the new planning structure in the southern half of the province represented by zones 4-6.

Table One – Degree of Education Plan Revisions by Zone

<u>Zone</u>	<u>Major Revision</u>	<u>Minor Revision</u>
One	5	4
Two/three	20	5
Four	7	0
Five	7	1
Six	9	1
Total	48	11

Methodology

The methods used in analyzing school board education plans involves the following. Alberta Learning Field Services Division and System Improvement and Reporting Division staff collaborate in creating a Summary and Review form, unique for each planning cycle, designed to capture key aspects of the local planning context and in relationship to the *Guide for School Board Planning and Reporting*. Field Services staff read each education plan, highlighting key aspects in relation to the Summary and Review forms. These forms are then reviewed and verified by Field Services with the school superintendent or designate. The System Improvement and Reporting Division then completes a content analysis of the Summary and Review forms noting key patterns. These patterns and themes are then summarized in a report that rolls up this information for all of the public and separate school boards in Alberta.

This process was supplemented with additional input from zone meetings with the College of Alberta School Superintendents held in September and October 2000 to gather input on some key emerging issues regarding the optimal operation of the Alberta accountability framework for basic education. This input is summarized beginning on page 3.

¹ One jurisdiction has been given permission to delay submission of their education plan until 2002.

Quick Analysis

The 2000-2003 school board education plans were due to Alberta Learning by May 30, 2000. The education plans received by mid-June were read and summarized on June 22 and 23. This fast tracked analysis was conducted to ensure a timely consideration of key themes in the school board education plans that held implications for the provincial planning cycle then underway. Only 38 of 59 or 64% of the school board plans had been received by June 21, hence limiting the jurisdiction representation in this preliminary analysis. There were, however, some notable themes observed that were captured for early input into the Ministry's planning cycle. These observations are highlighted below. Follow-up meetings by Field Services branches with school jurisdiction superintendents or designates resulted in the more complete analysis of the education plans and this information is summarized beginning on page 4.

PRELIMINARY FINDINGS

Education plans received by June 21 were read and analyzed during an intensive two-day retreat by Field Services and System Improvement and Reporting staff. As a result of this activity, a number of issues were shared with Alberta Learning staff at subsequent planning sessions and meetings throughout the summer and fall of 2000. These issues focus on improving the articulation between provincial and jurisdiction planning.

1. Where there is a provincial priority in the Ministry's three-year plan a parallel outcome and performance measure would inform the implementation status of the priority.
2. The "Ready to learn" outcome, especially in relationship to the pre-ECS age ranges, is not strongly represented in the plans; other than via the Early Literacy Initiatives (ELI).
3. Provincial goals/outcomes have a poor correspondence to measures as boards are relating old measures into the new goal/outcome framework. There is a need to identify exemplars and share with jurisdictions (see the section on sample measures in this report on pages 10-13).
4. The "Safe and Caring Schools" issue has a poor fit to the goal structure in the Ministry's plan.
5. Technology can fit well in goal one or three, but it is not clearly identified in the Ministry's 2000 - 2003 plan.
6. Teacher growth and supervision also has a poorly defined fit with the Ministry's 2000-2003 plan.
7. The requirement for a summary of related board planning has resulted in some boards appending a copy of the related plan. There is a need to review and clarify the rationale for requiring related board planning.
8. Planning for summaries of progress and achievement of ELI, ESL and Special Education is not well presented. There is a need to review this planning and reporting process; for example, there may be merit in outcomes statements for key funding initiatives such as ELI, ESL, Special Education and AISI.
9. School board AERR priorities or areas for improvement are not always clearly demonstrated in the education plans. The value of the AERR as a source document for the education planning cycle needs to be emphasized in some cases.
10. Target setting continues to be an issue with respect to provincial standards too often being accepted as a universal target.

FEEDBACK ON ACCOUNTABILITY QUESTIONS AT JURISDICTION AND CASS ZONE MEETINGS

The summary report on School Jurisdiction 1998-99 Annual Education Results Reports was published in March 2000. This report and an internal Ministry value-added critique of the summary report, in conjunction with the preliminary read of 38 education plans as of June 2000, identified the following topics that warranted further investigation with superintendents:

- Collaboration/compliance balance
- Provincial-local priorities balance
- Value of core measures and flexible templates
- Target setting processes

These issues were discussed at College of Alberta School Superintendents zone meetings with Field Services and System Improvement and Reporting staff in September and October of 2000. The key themes emanating from this dialogue are presented below. Notes from these meetings are found in Appendix A.

Question #1: if you were to prioritize the three purposes of accountability, what would this ranking look like?

The overall pattern demonstrates near consensus that the primary purpose of accountability is to support processes of continuous improvement. However, there is considerable variance regarding what is the next priority; articulation of planning and reporting across organizational boundaries versus reporting to the public. This variance of opinion could explain some of the dissonance voiced about the accountability model expressed by superintendents.

Question #2: is the balance between compliance and collaboration about right?

There appears to be considerable opinion that opportunities for local input to the overall accountability model have been too limited and that compliance still outweighs collaboration. Some superintendents still view the accountability model as too prescriptive and oriented to provincial priorities/needs at the expense of local priorities or needs.

Question #3: Should the accountability framework maintain a core set of required measures beyond achievement tests, diploma exam results and participation rates and/or templates to provide for comparability of measures

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Opportunities for local input into the selection and design of measures still are too limited. Responses to the question about a core set of measures invariably focused on opinion measures, when the intent of the question was premised on the need for more empirical measures. This emphasis underscores the present imbalance favoring opinion-based measures. However, there appears to be an appreciation of the need to improve the measures currently underlying the accountability model and the need for better sharing of good measures between the Ministry and jurisdictions. Little support for general planning or reporting templates was apparent.

Question #4: Do provincial standards for achievement on Provincial Achievement Tests and Diploma Exams provide meaningful jurisdiction targets for all student achievement tests and diploma exams, or should targets vary in relationship to past performances?

Responses to this question demonstrate that there is a need for clearer technical information on PAT and diploma exam data comparability in relationship to the target setting issue. It is also clear that the Ministry must demonstrate leadership in provincial target setting where results historically depart from the provincial standards.

Other Findings

Additional comments reinforce the point that many superintendents view the new Ministry three year plan as being too broad for direct relevance to school boards. The new *Guide to School Board Planning and Reporting* will need to reconsider the goals and outcomes relationships to school board contexts. Given the expressed commitment of superintendents to accountability, it is clearly possible to define a balanced planning and reporting relationship across organizational boundaries among the Ministry, jurisdictions and schools. However, it is also clear that this optimal balance has not yet been struck. Timing relationships remain an on-going challenge to making the accountability model run smoothly.

PROVINCIAL PRIORITY AREAS FOR IMPROVEMENT

Provincial priorities for improvement remained unchanged for the 2000-2003 planning period. Most school board plans included all of the priorities in their plans, but there was some slippage with four plans not including increasing high school completion, and two not including improving secondary mathematics.

Superintendents were asked to rank the importance of the provincial priorities during follow-up interviews. The number of superintendents providing input, the priorities rankings and the mathematical average rankings are summarized in the following table.

Table Two – Superintendent Ranking of Provincial Priorities

Rank	Priority	N	Average
1	Improving access to information technology	34	2.26
2	Improving secondary student achievement in mathematics	34	2.32
3	Improving coordination of services for children	33	2.42
4	Increasing high school completion rates	34	3.35
5	Improving public satisfaction.	32	3.40

The first three rankings are very similar in terms of the overall mathematical averages, and two of these priorities have specific funding support. Some concern should be expressed that the increasing high school completion rates priority is a distant fourth. This ranking and average could demonstrate that because Alberta Learning has not been able to provide high school completion rates at the jurisdiction level that the priority has somehow lessened. Lastly, some opinion has been expressed that increasing public satisfaction is perceived as more a Ministry responsibility. This point of view may explain the last place ranking of this priority.

STRATEGIES FOR PROVINCIAL PRIORITIES

Plans were analyzed to identify examples of good strategies for addressing provincial priorities. A list of these strategies is presented in Table Three. Many of the strategies were represented in more than one education plan.

Table Three – Sample Strategies From School Board Plans

Priority	Sample Strategy
Increasing high school completion rates ²	• Expand family/school liaison – outreach; mentorship of students • Teacher-tutor program • Partner with business for program & employment choice • Expand Universal Outreach Program to drop-outs • Youth summit leading to development of Youth Council • Develop a process to identify factors affecting completion. • Establish baseline data on school leavers • Outreach programs supported with video conferencing • Analyze completion trends and develop proactive strategies • Participate with Red Deer College and other partners in development of an education program for young adults • Increase CTS offerings to improve student relevancy for education • Continue to provide a variety of program options for high school students • Vocational high schools, increasing completion rates of aboriginal students, RAP, Chinook College
Improving secondary student achievement in mathematics ²	• Develop standards to address Math achievement • Training of lead teachers • Division-wide exams in Math 7, 8, 9, pure 10, 20; Modified Jr. High Math Program • TLE Math • Staff development, marketing of examinations, analysis of examination results • Encourage teacher participation in cross-grade curricular and instructional strategy development • Division curriculum coordinators and Math team will work toward improvement of results • Increase the amount of instructional time allocated to Grade 9 mathematics
Improving coordination of services for children	• Enhance continuity for special needs students from jr. to sr. high; continue school community teams • Staff in-service on FAS, behavioral disorders • Develop guide to outline community based agencies/programs

² Two major studies of barriers to high school completion and factors affecting achievement of grade 1-9 mathematics are underway and scheduled for publication by Alberta Learning in the spring 2001.

	• Bridges Project (immigrants), at risk students, anti-racism, anti-bullying • Services made available through a new referral service called the Student Health Outreach Service
Improving access to information technology	• New business partnership for improved communication & course options • Lead teacher (technology mentor) program in every school • Technology Advisory Group (TAG); Improvement of Internal Infrastructure (e-mail, etc.), use ICT outcomes • Support a team of Technology Mentors in all schools
Improving public satisfaction	• Developing meaningful school council involvement in the life of the school • Numerous effective partnerships e.g. Concordia College, NAIT, CISCO, and DOW • PR committee working with partner groups including student councils • Enhanced communication with involvement of parents • Collaborate with Economic Development Authority • Hold three annual joint Board of Ed./School Council meetings • Prepare monthly education articles ("Edu-Comment") for local newspapers • Think tank/planning process

BOARD PRIORITY AREAS FOR IMPROVEMENT

School board education plans were also reviewed to identify frequency patterns related to distinct board identified priorities that may hold policy or planning implications for the Ministry. Distinct priorities are defined as those that exist outside of any direct relationship to existing Ministry priorities or goals, or that are seen as adding value to a provincial priority or goal. Board priorities that were related to the specific mandate of Francophone or Separate boards, although significant for those boards, were not included in this analysis because they do not have universal implications for provincial planning. Although the priorities are ranked by frequency, the distinctiveness of the item and the strategic implications for provincial planning served as additional filters for selecting the priorities identified in Table Four.

Table Four – Board Identified Priorities

Priority
Parent involvement, communications, cooperation and involvement in School Based Decision Making
Funding issues, e.g. equity for small schools, etc.
Student and staff wellness and retaining staff
Safe and caring schools
Staff professional development
Career counseling for students
Increase program choice for students
Develop educational leadership and teamwork
Develop alternative/supplemental measures of student achievement
Programming for secondary Aboriginal students

REVIEW OF OUTCOMES AND MEASURES

Alberta Learning's *Guide to School Board Planning and Reporting* has been changing over the years to provide more flexibility to school jurisdictions in selecting what measures will be employed to assess progress achieved in relationship to provincially determined goals and outcomes. In order to accommodate the transition to the new organizational structure of the newly reorganized Ministry of Learning, this flexibility was maximized for the 2000-2003 planning period so that boards also had flexibility in what outcomes would be included in their plans. Table Five summarizes the degree of adoption of the provincial outcomes and measures and the extent to which boards addressed these requirements in their Education Plans. This analysis applies only to the 48 boards that completed major revisions of their plans to be consistent with the newly reorganized Ministry's plan.

**Table Five – Extent to which Provincial Outcomes and Measures are Included in
Plans
N=48**

Goal and Outcomes	Outcomes Yes -%	Measures Yes - %
Goal 1 High quality Learning Opportunities		
• Learning system is flexible and provide a variety of programs and modes of delivery	100	90
• The learning system meets the needs of all learners, society and the economy	90	81
• All Albertans can participate in learning	81	58
• Albertans with special needs can participate in learning.	98	88
• Financial need is not a barrier to participating in learning opportunities.	67	40
• The learning system is affordable.	73	58
Goal 2 – Excellence in Learner Achievement		
• Learners demonstrate high standards	98	See separate analysis of required measures below
• Learners complete programs	83	
Goal 3 – Well prepared learners for lifelong learning, world of work and citizenship		
• Children start school ready to learn.	88	73
• Learners are able to learn continuously: in school, at work and in society.	83	65
• Learners' achievement is recognized.	85	58
• Learners are successful in finding and maintaining employment.	71	50
• Learners have the knowledge, skills and attitudes to become contributing members of society.	92	77
• Learners have an awareness of the increasing global interdependency.	69	50
Goal 4 – Effective working relationships with partners		
• Joint initiatives meet the learning needs of Albertans	98	92
• Partners are satisfied with the effectiveness of partnerships	98	90

Very few measures were specifically mandated by Alberta Learning for the school boards' 2000-2003 education plans and those that were all related to goal 2, *Excellence in learner achievement*. Although all of the education plans include measures relating to the provincial testing program, adherence to some of the specific nuances of reporting this data still present some variation as noted in Table Six below. This analysis is again restricted to the 48 plans that represented major revisions consistent with the new Alberta Learning three-year plan.

Table Six – Required Measures Related to Goal 2

Required Provincial Measures	Percent Included
Provincial achievement test five year trends based on students' writing	58
Provincial achievement test five year trends based on cohort	42
Diploma exam results	92
Percent of students achieving jurisdiction targets on achievement tests	90
Percent of students achieving jurisdiction targets on diploma exams	85
Basis of target setting	Provincial Standards 77 and/or previous performance 71
Participation rates in provincial achievement tests	85
Participation rates in diploma exams	85
Board measure for "learners complete programs"	81

SAMPLE OUTCOME MEASURES

Because school boards had considerable flexibility in designing and selecting the measures that will be used in assessing the results achieved via the 2000-2003 education plans, the plans were carefully considered for samples of good measures. Satisfaction measures, similar to the provincial approach, are dominant and have not been included here. However, some more empirical measures were identified and these are summarized in relationship to the respective outcome in Table Seven.

Table Seven – Sample Outcomes Measures

Outcomes	Sample Measure
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Goal 1 High quality Learning Opportunities • Learning system is flexible and provides a variety of programs and modes of delivery • The learning system meets the needs of all learners, society and the economy • All Albertans can participate in learning • Albertans with special needs can participate in learning. • Financial need is not a barrier to participating in learning opportunities. • The learning system is affordable.	• Percent of students using alternative delivery • Percent of grade one and two students reading at grade level • Number of courses offered online and number of students accessing courses • Percent of students in ESL who are reading/writing at grade level • Percent of school fees subsidized by the division • Spending per student/school fees • Provincial, zone and jurisdiction comparison of mandatory school fees • Percent of parents able to pay the designated fees by program
Goal 2 – Excellence in Learner Achievement • Learners demonstrate high standards • Learners complete programs	• Number and percent of Rutherford scholarships • High school completion rates

Goal 3 – Well prepared learners for lifelong learning, world of work and citizenship

• Children start school ready to learn. • Learners are able to learn continuously: in school, at work and in society. • Learners' achievement is recognized. • Learners are successful in finding and maintaining employment. • Learners have the knowledge, skills and attitudes to become contributing members of society. • Learners have an awareness of the increasing global interdependency.	• Percent of grade one and/or two students reading and writing at or above grade level • Percent of grade one students who attended ECS • Literacy skills of students at end of ECS • Number of students identified through early screening and hours of intervention provided • Percent high schools graduates employed or in post-secondary school • Percent of students who regularly access the internet • Number of off-campus sites used to achieve credits or job-shadowing programs • Number of students involved in Work Experience and/or Tech Prep or RAP • Number of schools publicizing and celebrating student successes • Number of students recognized • Percent of students who feel proud of the work they do at school • None identified • Number of high school students who develop career plans and portfolios • Achievement results in Social Studies • Number of students who access the Web to communicate or complete research • Number of students involved in exchange/travel programs • Percent of students enrolled in second language programs
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Goal 4 – Effective working relationships with partners • Joint initiatives meet the learning needs of Albertans • Partners are satisfied with the effectiveness of partnerships	• Percent of schools with school-business partnerships • Percent of partners in joint initiatives satisfied with effectiveness of partnership
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PROGRESS AND ACHIEVEMENT OF SPECIFIC GROUPS OF STUDENTS

School board plans are expected to include consideration of several interrelated areas including a summary of progress and achievement of students served by Early Literacy Projects, English as a Second Language programs and/or special needs programs. Most, but not all boards are referencing these reporting requirements in their plans. Consideration of the impact of these programs on student achievement assist the province and school boards in fine tuning program delivery strategies. In the case of ESL and Special needs programs, MIRS schedules facilitate data collection and program analysis. Given these related reporting activities, Alberta Learning Field Services staff will be well positioned to monitor and work with boards to assess if these reporting requirements add value to improvement processes within school jurisdictions.

RELATED BOARD PLANNING

School board plans were expected to describe related board planning in the areas of AISI projects, long term facilities planning, three-year capital planning and in technology planning. This analysis of plans suggest there is a need to clarify the meaning of long term facilities planning in relationship to three-year capital planning. The fit of AISI project planning to this requirement also warrants review. The rationale for this aspect of related planning is being clarified in the new 2001 *Guide to School Board Planning and Reporting*.

SUMMARY BUDGET INFORMATION

Summary budget information has largely become routine in all but a few school board plans. Most plans reference clearly presented summary budget information. However, in the interest of openness and full communications, a number of school jurisdictions need to remember to include information on where and how the public may access the complete jurisdiction budget.

ISSUES AND RESPONSES

Overall, the preliminary findings outlined in this report indicate concerted effort to adopt the new goals and outcomes reflected in the new Alberta Learning three-year plan. In total, the vast majority, or 81%, of the jurisdictions incorporated the latest (major) revisions in their education plans. Also, there was a high degree of consensus on the major purpose of accountability, namely, supporting processes of continuous improvement in the Alberta Learning system.

At the same time, the analysis unveiled some limitations in the current planning and accountability model, the ultimate goal of which is attaining balanced planning and reporting across organizational boundaries (from the Ministry through jurisdictions to individual schools and vice versa). Many of these limitations can be attributed to the current transition and adjustment period associated with a new organizational and planning structure of the amalgamated Ministry and to the complex nature of implementing a comprehensive accountability model. This report highlights the issues that need to be addressed in future planning and continuous improvement to make sure that the accountability system runs smoothly and meets needs of all parties involved. These issues can be summarized into the following key themes:

Education plans content and structure

- (1) **The measurement issue:** the usefulness of a set of core measures is recognized by the jurisdictions, but overall there appears to be an appreciation of the need to improve the measures currently underlying the accountability model. There is also the need for better sharing of good measures between the Ministry and jurisdictions. A good example of sharing information is providing jurisdictions with certain types of summarized information, such as jurisdiction high school completion rates and percent of graduates entering post-secondary education (suggested by ZONE 4, p. 21). The information from jurisdictions helps the Ministry in its planning process, and generalized information from the Ministry helps jurisdictions/schools in planning programs/courses. Although there was an observation that provincial goals/outcomes have a poor correspondence to older measures in the plans (p. 2, point 3), there were many examples of a good relationship between emerging measures and the new goals/outcomes (Table Seven).

Response: Alberta Learning will use this report to stimulate and continue dialogue with jurisdictions regarding development and adoption of optimal outcome measures.

- (2) **Goals and outcomes clarity/relevance:** Creation of an adequate measurement system is difficult without a clear definition of the plan's goals and outcomes and their mutual correspondence. Some important outcomes are poorly or not clearly identified. For instance, issues such as the Safe and Caring Schools, teacher professional growth and supervision and the *Ready to learn* outcome are not currently well identified in the Ministry's plan. Also, planning for summaries of progress and achievement of ELI, ESL and Special Education is not well presented and school board AERR priorities or areas for improvement are not always clearly demonstrated in jurisdiction education plans.

Response: Alberta Learning has reviewed the relevance of provincial outcomes

for basic education and has communicated the results of this review to school superintendents.

- (3) **Simplicity ("user-friendliness") of the plan's structure:** A key point in making the planning cycle a success is creating the plan's priority, goal, outcome, and measurement structure that is simple and manageable for users. This issue was raised on several occasions during the CASS discussion groups. While some superintendents prized the current Ministry's plan structure for including fewer goals than the old plan, others thought that there were still too many goals, which made the plan hard to focus on and spread resources too thinly. Also, some superintendents considered providing a measure for each of the outcome statements to be an unrealistic task. It is important to note, however, that the simplicity was not associated with generality. Many superintendents viewed the new Ministry plan as being too broad and not directly relevant to school boards. Some of them characterized the present outcome statements as being too general and abstract (not reflecting reality) and noted that the accountability requirements need to be simplified but "rooted in reality" and be "specific to our work." Based on this feedback, we can conclude that more work is needed on the part of the Ministry on balancing the specificity and generality of the education plan. The plan needs to be specific enough to reflect the needs of individual jurisdictions, but at the same time be general (standardized) enough for identifying key strategic goals and ensuring consistency and comparability in planning and measurement. This task implies close co-operation and constant feedback between the Ministry and jurisdictions.

Response: Alberta Learning has defined an inter-divisional communication plan around accountability processes for basic education and is committed to maintaining routine dialogue with school jurisdictions on accountability processes.

- (4) **Reporting progress and achievement of specific groups of students:** This planning and reporting requirement continues to represent a messy area of the accountability model. Alberta Learning will reconsider how this requirement is being positioned in the *Guide to School Board Planning and Reporting*.

Response: The committee reviewing the new Guide has considered this issue.

- (5) **Related Board Planning:** As with point 4, this area represents awkward approaches to integrated planning. Including AISI planning with infrastructure planning may be a case of mixing apples and oranges. Alberta Learning will also review this aspect of the *Guide to School Board Planning and Reporting*.

Response: The committee reviewing the new Guide has considered this issue.

Strategies for education plan development and implementation

- (1) **The balance between compliance and collaboration:** As reflected in this report, there was a general perception among the superintendents that compliance and collaboration are not well balanced under the current accountability system and that compliance still overweighs collaboration. As a result, the accountability model is being perceived as too prescriptive, limiting the opportunities for local input, and oriented to provincial priorities/needs at

the expense of local priorities or needs. Moreover, some of the superintendents think that the current provincial plan has even more compliance to it than before. The major implication of such a situation is the perception that the provincial agenda is not relevant and is different from the schools' and boards' agendas, and that priorities are not balanced.

Alberta Learning needs to further facilitate an approach to the plan development and implementation as a "two-way" process. Under this approach an equal emphasis should be attached to the "top-to-bottom" (province-boards-schools) and "bottom-to-top" (schools-boards-province) flows of information and ideas. A step in this direction has been already made in the present three-year plan, which attempts to recognize board identified priority areas and board strategies related to provincial priorities. However, the results on superintendent ranking of provincial priorities presented in this report (Table Two) suggest that the provincial accountability model is still lacking an adequate "two-way" information flow.

Response: The System Improvement and Reporting Division is coordinating a project with three superintendents and the Field Services Division to consider further the CASS feedback on accountability issues and to recommend further refinements to the accountability model for basic education.

- (2) **The timing issue:** The lateness of plan requirements (guide) continues to be a problem because jurisdictions start planning in the fall.

Response: The committee reviewing the new Guide is considering ways to make the guide more long term in its scope and dynamic in response to changing aspects of accountability.

- (3) **Provincial priorities:** The relatively low ranking of the priority of improving high school completion points to the need to ensure that school jurisdictions receive data on their high school completion rates. All stakeholders will want to give careful consideration to the soon to be published Alberta Learning report, "Removing Barriers to High School Completion." The last place ranking of improving public satisfaction suggests the need to reframe this priority in ways that hold more relevance to school jurisdictions. The sample strategies identified in this report may help to support their implementation.

Response: An internal Alberta Learning committee is considering ways to provide school completion rate data to school jurisdictions.

- (4) **Board priorities:** The priorities of school boards identified in Table Four identify potentially important areas of concern that should be reviewed in relationship to the provincial planning cycle to first verify the validity of the priority with the field and then to ensure they are adequately reflected in Alberta Learning's business planning cycle.

Response: Inter-divisional meetings are planned to address this issue.

- (5) **Outcome measures:** Because this is a transition year in planning, boards had considerable flexibility in selecting outcomes. Therefore, this reports presentation of sample outcome measures can serve to stimulate further development of outcome measures in school jurisdiction plans and reports.

Response: Field Services branches will use this report as a basis for further dialogue with superintendents on this issue.

6. Several school board plans were noted as being exemplars for a variety of reasons. These plans are worth noting so they might serve as a model for other jurisdictions that may be interested in pursuing similar directions. These plans also are noteworthy for their contribution to demonstrating some powerful benefits of education planning. These exemplars are not exhaustive of models of good planning by Alberta school boards, however, among such models were the following:

- Two large urban jurisdiction education plans reflect a strong orientation to innovation and responsiveness to students' needs.
- Two mid-size city district education plans boards have strong links with local colleges.
- Two rural jurisdiction education plans demonstrate a strong relationship between measures and new goals/outcomes.

Response: Field Services branches will continue to fulfill a collaborative advisory function through their dialogue with superintendents in identifying exemplary education plans. Please contact Field Services Zone offices for more detail regarding examples of exemplary planning.

In summary, a central issue in the education planning process, is that of closer collaboration between the Ministry, jurisdictions and schools. This collaboration would provide a base for co-operative decisions and agreement on key priorities, goals and outcomes of the education system. A more integrated data collection system, including improved core measures and their administration and reporting, should reflect the key goals and outcomes.

NEXT STEPS

This report marks a turning point on the road to implementing a highly interactive and meaningful accountability model for basic education in Alberta. A number of key issues are identified that demonstrate clearly that Alberta Learning is serious about implementing an interactive accountability model that truly achieves the multiple purposes of continuously improving the education system while simultaneously communicating important information to the public and effecting better articulation of planning and evaluation functions across organisational boundaries. Recommended next steps to facilitate optimal consideration of this report include the following.

1. Many of the issues identified in this report that hold implications for the design of the Guide to School Board Planning and Reporting have been considered by the Guide advisory committee. The new Guide reflects responsiveness to these issues and it was released in a more timely way than in years past. The new Guide should be the focus of a detailed evaluation to assess the extent to which the newly designed document meets the key objectives of the accountability model for school boards and the Ministry.
2. Dialogue between school jurisdiction staff and Ministry staff is highly effective in generating broader understanding of the common points of accountability that unify the work of each

3. Jurisdictions have clearly demonstrated the need for a valid and reliable measure of high school completion at the jurisdiction level. Alberta Learning should place a high priority on developing this critically important measure.

QUESTION #1: IF YOU WERE TO PRIORITIZE THE THREE PURPOSES OF ACCOUNTABILITY, WHAT WOULD THIS RANKING LOOK LIKE?

Table Eight – Superintendent Rankings of the Purposes of Accountability

	Zone 1	Zone 2/3			Zone 6		
Respondent	A	A	B	C	A	B, C, D	E
To support processes of continuous improvement in the Alberta education system	1	1	1	1	3	1	1
To articulate planning and reporting between provincial, jurisdiction and school levels	3	2	3	0	2	2	3
To communicate directions and outcomes of the education system to the public at the provincial, board and school levels.	2	3	2	0	1	3	2

Zone 6

- So much information goes to the community, and some of it is misinformation. We want to make sure that we communicate accurate information.
- System improvement is always the most important goal. (Three jurisdictions)
- The whole purpose of accountability is to reflect, evaluate and find ways for continual improvement.
- Examples of improvement achieved are _____ evident in science and social studies.

Zone 5

- There is residual anger regarding the way accountability measures were implemented. This was suppressed for a time as people adjusted to the changes.
- The accountability system has been seen as closed. It is critical that school plans reflect the local needs and that jurisdiction plans roll this up and communicate this to provincial decision making processes.

Zone 1

- Thought there were still too many goals--hard to focus; accountability requirements need to be simplified, rooted in reality.
- Still too top-down/compliance driven--improvement and reporting more important than compliance.

Question #2: Is the balance between compliance and collaboration about right?

RESPONSES

Zone 6

- It has become very prescriptive. I do not want it to become even more so.
- The reporting process is still weighted toward compliance. The current plan does not reflect what districts really do, because so much of it is dictated from outside using someone else's structure and language. I believe strongly in making a plan. But, if I could do the planning totally on my own, it would look much different. All I would really like is a core statement that says that we focus on student learning. I would expect to report all the stats on student learning. After that, I would like to be able to pick and choose, and shape the ideas in a way that makes sense to my school community. The direction could be, "Tell us how you are going to plan for student learning, and then report it."
- This Business Plan emphasizes Alberta Learning goals. There should be an opportunity for partners and stakeholders to provide input at the early draft stage.
- The Business Plan is presented as required (compliance). In order to have more collaboration, jurisdictions would have to have more options available to them.
- This plan has more compliance to it than before. The old results statements were more easily relevant to us.
- There is too much compliance. You lose the trust of the jurisdictions by not trusting them to do the planning that is most relevant to them. There is no local autonomy or choice left in this process.
- Expecting a measure for EACH of the outcome statements is unrealistic.
- The outcome statements are now too general. We liked the statements before because they were specific to our work and were focussed on K-12.

Zone 5

- Need a clear audit trail of provincial priorities, clearly apparent to the grass roots (i.e. school) level.
- Align reporting with internal improvement processes that align with provincial needs. This must first happen at the school/board level.
- Need to create multiple stakeholder opportunities for ownership of the accountability model.
- Reality is schools' and boards' agendas are very different from provincial agenda; e.g. political

agenda for testing is different than educators' agenda – instrumental vs. humanistic purposes of education.

- The voices of educators needs to be more honored.

Zone 2/3

- Timelines are too tight – in theory the model should work, but in reality the results reports are not done in time to input the next cycle.
- Fewer goals (as now) is better – too many goals taxes ability to address.

Zone 1

- Templates not a good idea – too restrictive – would Catholic goals be represented?
- Templates should be optional – high variation between jurisdictions.
- Too many goals – spreads resources too thin. Focus on priorities.
- Balance is not right – priorities are not balanced.

Question #3: Should the accountability framework maintain a core set of required measures beyond achievement tests, diploma exam results and participation rates and/or templates to provide for comparability of measures between jurisdictions?

Responses

ZONE 6

- No. What other measures would be used? Would these measures include satisfaction survey results? Would such measures be considered soft measures, so therefore not as reliable? Who would decide the measures and how would they be standardized. I am not sure I would want my jurisdiction results on these measures to be published and compared to other jurisdictions under these conditions
- No, what would it achieve? How would you compare different communities with different student populations? The Ministry could run the risk of people playing games with the data, since they are collecting it themselves.
- If this is suggesting a need for hard data, then Alberta Learning would have to provide survey questions that would be used across the whole province by everyone in the same way. And if it was a standard questionnaire, would there be the opportunity for the jurisdiction to add some of its own questions? It would also need a "Comments" section. This provides the most helpful information.
- Any comparisons of these "soft" areas would be tentative. How do we interpret soft data?
- If you want to look at other measures, look at how students feel they are treated. This is the biggest personal issue we deal with all the time. But I am not sure how you would develop measures on that.

Zone 4

- Superintendents want the Ministry to provide jurisdiction-level high school completion rate and want the jurisdiction profile information on the internet updated
- Superintendents also want to know what percent of their graduates go on to post-secondary overall and by institution/type of program. This info would be helpful in planning high school programs/courses.

- Ministry should move quickly on the unique student identifier (related to previous point)
- Suggestions for reporting financial highlights:
 - indicate enrollment growth as well as spending increases
 - indicate national ranking of Alberta on per student spending
- Planning and reporting templates would be valuable

Zone 2/3

- Core measures should include "organizational capacity" e.g. PTR, number of classes over 30 students, dollars spent on PD etc.
- Don't need more measures – fewer is better, but need help in areas like AISI project evaluation.
- Need to also support qualitative research.

Zone 1

- The outcome "children start school ready to learn" was useful info to collect not so much for the school system as for families, social services, health authorities. Also didn't want the school system judged on such an outcome – it may be irrelevant as we have to take all comers--ready or not.
- See outcomes like "All Albertans have access to learning" (and others) as too broad, not readily applicable to basic ed system. We need help understanding our role in relation to the new outcomes.
- The above points suggest a need to rethink the transition this year to the full set of new goals and outcomes. Suggest the dept. call a halt to the current model (too much negative baggage; associated with cuts, etc.) and sit down with stakeholder reps, as with AISI, with as blank a page as possible, and design the accountability requirements collaboratively.
- Core measures could be useful.

Question #4: Do provincial standards for achievement on Provincial Achievement Tests and Diploma Exams provide meaningful jurisdiction targets for all student achievement tests and diploma exams, or should targets vary in relationship to past performances?

RESPONSES

Zone 6

- Once we are into using the new set of goals and measures in the three-year education plans more, we may establish our own targets. For this year, we just wanted to use the basic standard. It is a very helpful benchmark.
- Targets need to be realistic. Schools are comfortable with setting targets higher than provincial standards, but are uncomfortable with setting targets that would be below the standard.
- We need to have targets reflect the long-term district trends. Eventually, the district will set targets, but for this year, the schools just wanted to use the provincial standards.
- We see the provincial standard as a long-term goal when we are below it. But each school analyzes its own results, sets its own targets, and really pushes its program to address problems. The schools are using the AISI money to address these targets.
- Our jurisdiction does not put much faith in provincial targets. Ministry staff have said that Achievements tests are comparable from year to year, but that diploma results are not. So what

does this mean? If we can't compare DE, then how do we set targets?

- There are lots of things done to statistics that have led to the public being disillusioned by them.
- We support the process of looking at one's own achievement trends, and then setting realistic targets based on that history.
- Our local focus groups felt strongly that the jurisdiction should put in targets that are realistic and may be reached in a year.

Zone 5

- Target setting needs a process focused on improvement, building from the school level up.

Zone 4

- Target setting creates considerable consternation among principals. No buy-in to target setting; not part of the culture of accountability.

Zone 2/3

- Provincial standards are meaningful, but individual school should set own targets – I am happy if we are moving in the right direction.
- We use the provincial standards because we get burnt by public response when we varied from the provincial standard.
- What is meaningful at the local level is what is most critical.
- Participation rate targets are not set (so playing field is not level).

Zone 1

- Target setting is a problem – provincial standards on tests and DE's are meaningless. Past performance is more important.
- Targets should be set on past performance.

ADDITIONAL COMMENTS

Zone 6

- Many of the outcome statements do not easily fall within the K-12 jurisdictions.
- Some outcome statements are vague. "Learner achievement is recognized." "Learners have an awareness of the increasing global interdependency." Superintendents want to know exactly what these statements mean in the K-12 context. They need this explanation before they can formulate a meaningful measure.
- For all of Alberta Learning, the outcome statements make sense. Statements that really apply to K-12 should be "assigned" to school jurisdictions, while the others be assigned to other Alberta Learning partners and the Ministry; "Before deciding on an outcome statement, write up three different relevant and meaningful measures. If you can't do that, then rethink the relevance/usefulness of that outcome statement."
- Release the *Guide* earlier. Jurisdictions like to involve their publics in the process, which takes time.

Zone 4

- Planning cycle is always in the first year – not clear that minor edits are possible in years 2 and 3.

Zone 2/3

- Please be sensitive to the fact that Alberta Learning is now both basic and advanced education and some outcomes are not applicable to basic.

Zone 1

- Lateness of plan requirements (guide) continues to be a problem since jurisdictions start their planning in the fall.
- An education index was suggested.
- The more generic provincial plan has opened the door too wide on core measures.
- Roll up summary reports do not contain core information – too much fluff.
- Recommend to provincial CASS and ASBA that they commission a committee to recommend a new structure for accountability.